



Quick Look at the **Referral Inbox**

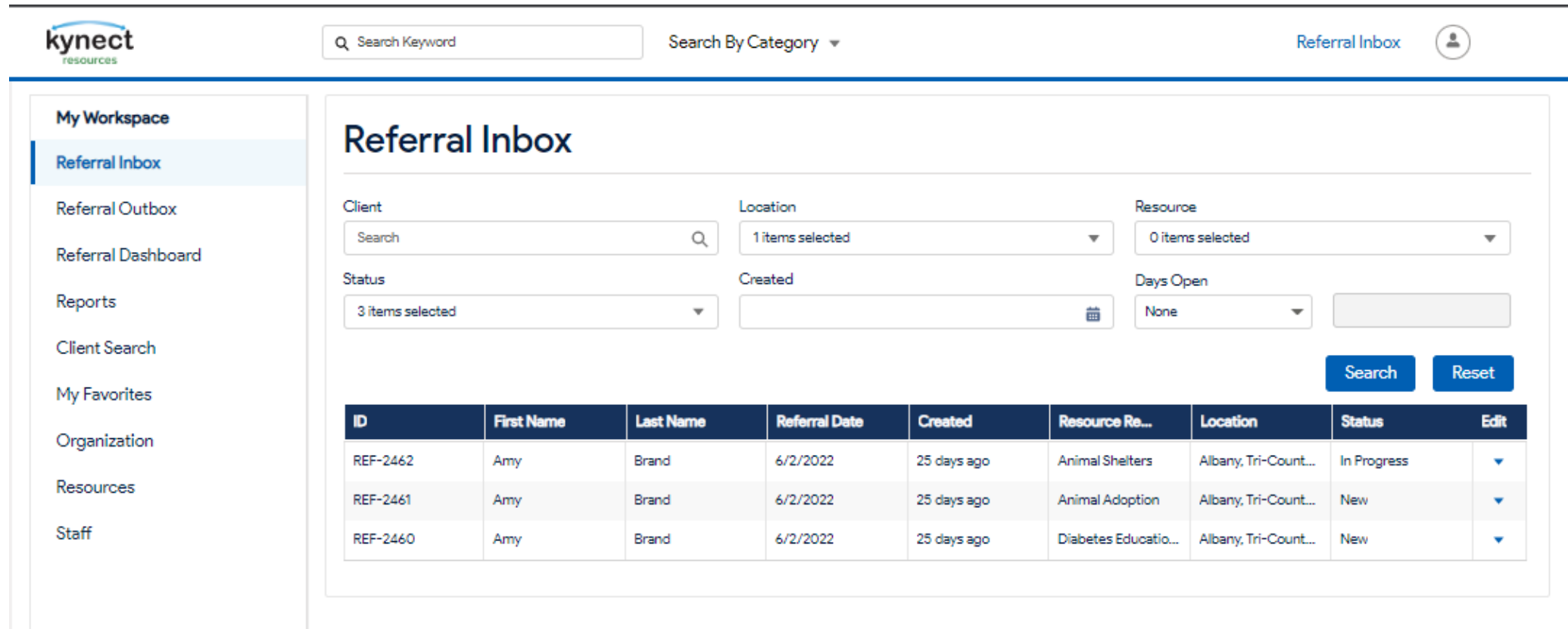
Use this Quick Look Guide to learn about the Referral Inbox

Referral Inbox



Upon log in, **kynect resources** opens to the **Referral Inbox** screen.
The **Referral Inbox** displays referrals made to the Community Partner's organization.

These referrals, or asks for help, are managed from the **Referral Inbox**.



The screenshot shows the Kynect Resources Referral Inbox interface. On the left is a sidebar with navigation links: My Workspace, Referral Inbox (selected), Referral Outbox, Referral Dashboard, Reports, Client Search, My Favorites, Organization, Resources, and Staff. The main content area is titled 'Referral Inbox' and features search filters for Client, Location, Resource, Status, Created, and Days Open. Below the filters are 'Search' and 'Reset' buttons. A table displays the referral data with columns for ID, First Name, Last Name, Referral Date, Created, Resource Re..., Location, Status, and Edit.

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	25 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	25 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	25 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼

Referral Inbox



The Referral Inbox screen displays the referral ID, the Name of the resident being referred, the Date of the referral, the Resource Requested, the Location of the resource and the referral Status.

Search By Category ▾

[Referral Inbox](#)

My Workspace

Referral Inbox

Referral Outbox

Referral Dashboard

Reports

Client Search

My Favorites

Organization

Resources

Staff

Referral Inbox

Client

Location

1 items selected ▾

Resource

0 items selected ▾

Status

3 items selected ▾

Created

Days Open

None ▾

Search

Reset

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	25 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▾
REF-2461	Amy	Brand	6/2/2022	25 days ago	Animal Adoption	Albany, Tri-Count...	New	▾
REF-2460	Amy	Brand	6/2/2022	25 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▾

The **Referral Inbox** screen allows a variety of functions to manage referrals.

The referral may be assigned a new **Status**, may be assigned to a specific staff member, or closed once services have been provided.

Search By Category ▼
Referral Inbox

My Workspace
Referral Inbox
Referral Outbox
Referral Dashboard
Reports
Client Search
My Favorites
Organization
Resources
Staff

Referral Inbox

Client

Location

1 items selected ▼

Resource

0 items selected ▼

Status

3 items selected ▼

Created

Days Open

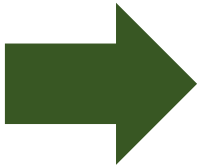
None ▼

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	25 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	25 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	25 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼

Referral Inbox



Community Partners are also able to navigate to other functions using the links in My Workspace from the Referral Inbox screen. The Client search is also available from the Referral Inbox screen.



Search By Category ▾

Referral Inbox

My Workspace

Referral Inbox

Referral Outbox

Referral Dashboard

Reports

Client Search

My Favorites

Organization

Resources

Staff

Referral Inbox

Client

Search

Q

Location

1 items selected

▾

Resource

0 items selected

▾

Status

3 items selected

▾

Created

📅

Days Open

None

▾

Search

Reset

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	25 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▾
REF-2461	Amy	Brand	6/2/2022	25 days ago	Animal Adoption	Albany, Tri-Count...	New	▾
REF-2460	Amy	Brand	6/2/2022	25 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▾





To open a referral, click the arrow button next to the referral, and click **Edit**.

My Workspace

Referral Inbox

Referral Outbox

Referral Dashboard

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Referral Inbox

Client

Search

Q

Location

1 items selected

▼

Resource

0 items selected

▼

Status

3 items selected

▼

Created

📅

Days Open

None

▼

Search

Reset

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	<div>▼</div> <div>Edit</div>
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption	Albany, Tri-Count...	New	<div>▼</div>
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	<div>▼</div>

Referral Inbox

The Referral Details screen displays the resident name and contact information.



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Referral Outbox

Referral Details

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Referral Details: REF-2461

Save

Resident

Amy Brand

Phone Number

(707) 244-9958

Email Address

amy.brand@mailinator.com

Referral Date

6/2/22 26 days ago

Referral Source

Albany, Tri-County Animal Shelter

Referral Assigned by

Julie Macaron

Referral Information

Resource Name

Animal Adoption

Status

New

New

In Progress

Closed

Assigned to

Unassigned

Add Note

The resident **Name** is a **blue hyperlink**. When clicked, this will navigate to the resident detail screen. The Resident must provide consent to view their information.

The Community Partner may use the **Phone Number** or **Email Address** to conduct outreach to the resident to respond to the referral and serve their need.

Referral Inbox

The Status of the referral may be set to **New**, **In Progress**, or **Closed**.



In Progress means the Community Partner is taking steps to contact the resident and provide services.

Closed indicates the referral has been completed, meaning the resident either received the services or the referral was closed for another reason.

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Referral Details: REF-2461 Save

Referral Source Information

Resident Amy Brand	Phone Number (707) 244-9958	Email Address amy.brand@mailinator.com
Referral Date 6/2/22 26 days ago	Referral Source Albany, Tri-County Animal Shelter	Referral Made By Julie Macaron

Referral Information

Resource Name
Animal Adoption

Status

New

New

In Progress

Closed

Assigned to

Unassigned

Add Note

Subject ↑	Description	Created By	Created Date	Modified Date
Disease Management Needs	Amy is in need of support for di...	Julie Macaron	6/28/2022	6/28/2022
Referral Created		Julie Macaron	6/2/2022	6/2/2022

Referral Inbox

The referral can be **Assigned** to specific staff member within the organization or remain **Unassigned**.



Search By Category ▾

Referral Inbox



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Referral Details: REF-2461


Referral Source Information


 Resident
Amy Brand

 Phone Number
(707) 244-9958

 Email Address
amy.brand@mailinator.com

 Referral Date
6/2/22 26 days ago

 Referral Source
Albany, Tri-County Animal Shelter

 Referral Made By
Julie Macaron

Referral Information

Resource Name
Animal Adoption

Status

New ▾

Notes

Subject ↑	Description	Created By	Created Date	Modified Date	
Referral Created		Julie Macaron	6/2/2022	6/2/2022	▾

Save

Click **Save** after making any changes on the Referral Details screen.

Assigned to

Unassigned ▾

Julie Macaron

Unassigned

Add Note

Referral Inbox



Notes are a helpful tool that allows organizations to collaborate and coordinate support for residents.
Notes can be viewed and added from the Referral Details screen.

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Referral Details: REF-2461

Save

Referral Source Information

Resident

Amy Brand

Phone Number

(707) 244-9958

Email Address

amy.brand@mailinator.com

Referral Date

6/2/22 26 days ago

Referral Source

Albany, Tri-County Animal Shelter

Referral Made By

Julie Macaron

Referral Information

Resource Name

Animal Adoption

Status

In Progress

Assigned to

Julie Macaron

Notes

Add Note

Subject ↑	Description	Created By	Created Date	Modified Date
Disease Management Needs	Amy is in need of support for di...	Julie Macaron	6/28/2022	6/28/2022
Referral Created		Julie Macaron	6/2/2022	6/2/2022

To View a previous note, click the down arrow next to the Note.

Click **Add Note** to create new Note

Referral Inbox



On the **Add Note** screen, enter a **Subject** and a **Description** then click **Save**. Remember, the purpose of the **Note** is to help facilitate understanding of the residents needs and collaboration with other organizations who may work with the resident.

Add Note

* Subject

Disease Management Needs

* Description

Amy is in need of support for diabetes management

Save

After a **Note** has been added, it can be viewed in the **Notes** section, with the **Subject** and **Description** fields as entered.

Notes					Add Note
Subject ↑	Description	Created By	Created Date	Modified Date	
Disease Management Needs	Amy is in need of support for di...	Julie Macaron	6/28/2022	6/28/2022	▼
Referral Created		Julie Macaron	6/2/2022	6/2/2022	▼

Referral Inbox



From the **Referral Details** screen, click **Back to Referral Inbox** to return to the Inbox.

← [Back to Referral Inbox](#)

Referral Details: REF-2462

Save

Referral Source Information

Resident
Amy Brand

Phone
(707)

Referral Date
6/2/22 26 days ago

Referral
Alba

My Workspace

Referral Inbox

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Client

Search



Location

1 items selected

Resource

0 items selected

Status

3 items selected

Created

Days Open

None

Search

Reset

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼

Referral Inbox



The **Referral Inbox** provides several search functions that allow users to quickly find specific groups of referrals.

These options include searching by **Name**, the organization **Location**, when there are multiple locations, by **Resources** being requested, by the referral **Status** or **Created** date.

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Client

Location

Resource

Status

Created

Days Open

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼

Referral Inbox



To search by Client, enter a client Name in the Search field. This will search the referrals in the inbox for the entered name.

The results will display in the inbox with all referrals to the organization for that resident.

Referral Inbox

Client

Amy B

Amy Brand, (707) 244-9958, amy.brand@mailinator.com

3 items selected

Location

1 items selected

Resource

0 items selected

Created

Days Open

None

Search

Reset

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼

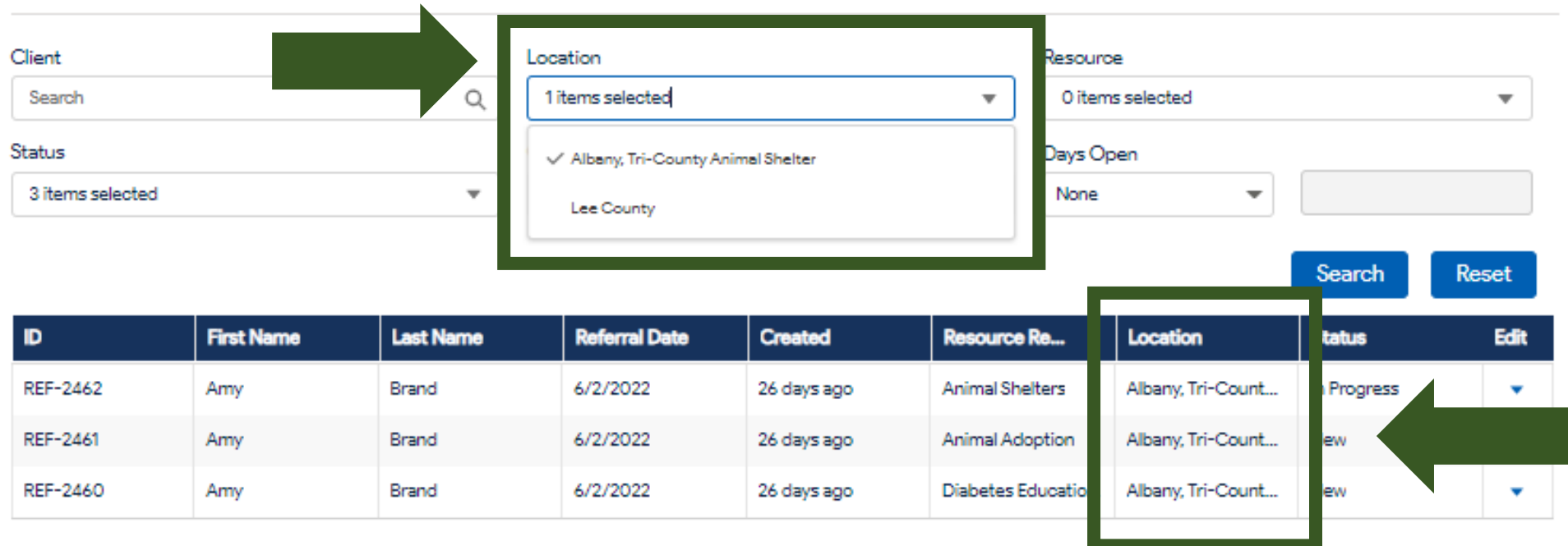
Referral Inbox



Community Partners can search the Referral Inbox by Location.
Many organizations offer resources at multiple locations. To display referrals for a specific location, click the arrow in the Location field and select from the listed Locations.

Referrals made to the Location selected will be displayed.

Referral Inbox



The screenshot shows the Referral Inbox interface. A green arrow points to the Location dropdown menu, which is open and shows "1 items selected" and "Albany, Tri-County Animal Shelter". Another green arrow points to the Location column in the table, which also shows "Albany, Tri-County Animal Shelter".

Client

Status

Location

- ✓ Albany, Tri-County Animal Shelter
- Lee County

Resource

Days Open

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	<input type="button" value="v"/>
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption	Albany, Tri-Count...	New	<input type="button" value="v"/>
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Education	Albany, Tri-Count...	New	<input type="button" value="v"/>

Referral Inbox

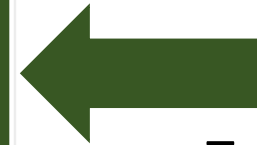


Referral Inbox

Client Location Resource

Status Created

ID	First Name	Last Name	Referral Date	Created	Resource
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelter
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Education Session



To search the Referral Inbox by **Resource**, click the **down arrow**, select the **Resource** name to search, then click **Search**.

The results will populate with all referrals to the organization for that **Resource**.

The search can be conducted for a **specific resident** or for a **broad search** for all Referrals received for a specific Resource.



Referral Inbox

Client Location Resource

Status Created Days Open

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	<input type="button" value="Edit"/>

Referral Inbox



Referral Inbox

Client: Search

Location: 1 items selected

Resource: 6 items selected

Status: 1 items selected

Created:

Days Open: None

	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2434	5/20/2022	39 days ago	Animal Adoption	Albany, Tri-Count...	Closed	<input type="button" value="Edit"/>
REF-2434	5/20/2022	39 days ago	Animal Shelters	Albany, Tri-Count...	Closed	<input type="button" value="Edit"/>
REF-2367	1/4/2022	175 days ago	Animal Shelters	Albany, Tri-Count...	Closed	<input type="button" value="Edit"/>

To Search by **Status**, select from the Status drop down menu. More than one Status may be selected.

The results will display all referrals from the **Inbox** with the **selected status**.

Referral Inbox

Client: Search

Location: 1 items selected

Resource: 6 items selected

Status: 1 items selected

Created:

Days Open: None


ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2435	Amy	Brand	5/20/2022	39 days ago	Animal Adoption	Albany, Tri-Count...	Closed	<input type="button" value="Edit"/>
REF-2434	Alexis	Dale	5/20/2022	39 days ago	Animal Shelters	Albany, Tri-Count...	Closed	<input type="button" value="Edit"/>
REF-2367	Alexis	Dale	1/4/2022	175 days ago	Animal Shelters	Albany, Tri-Count...	Closed	<input type="button" value="Edit"/>


Referral Inbox



The Referral Inbox screen helps organizations manage incoming requests by offering search functions, status management, Staff assignments and more.

As a reminder, Community Partners can also navigate to other **kynect resources** tools using the links in My Workspace.



[Referral Inbox](#)


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Referral Inbox

Client

Location

Resource

Status

Created

Days Open

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	25 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	25 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	25 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼



Thank you

For additional support, please use the Help section in **kynect resources** or email kynectresources@ky.gov